GhostFill POWER GENERATION FOR DOCUMENTS
Reseller/Developer Conference

GhostFill vs. HotDocs

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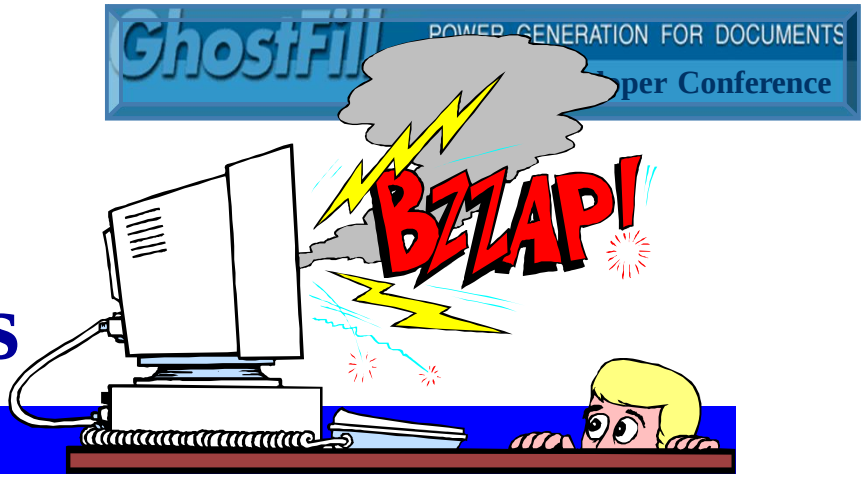
Agenda

- Living with HotDocs
- Head to Head
  - Developer Experience
  - End User Experience

Living with HotDocs



GhostFill Certified Consultant

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Head to Head

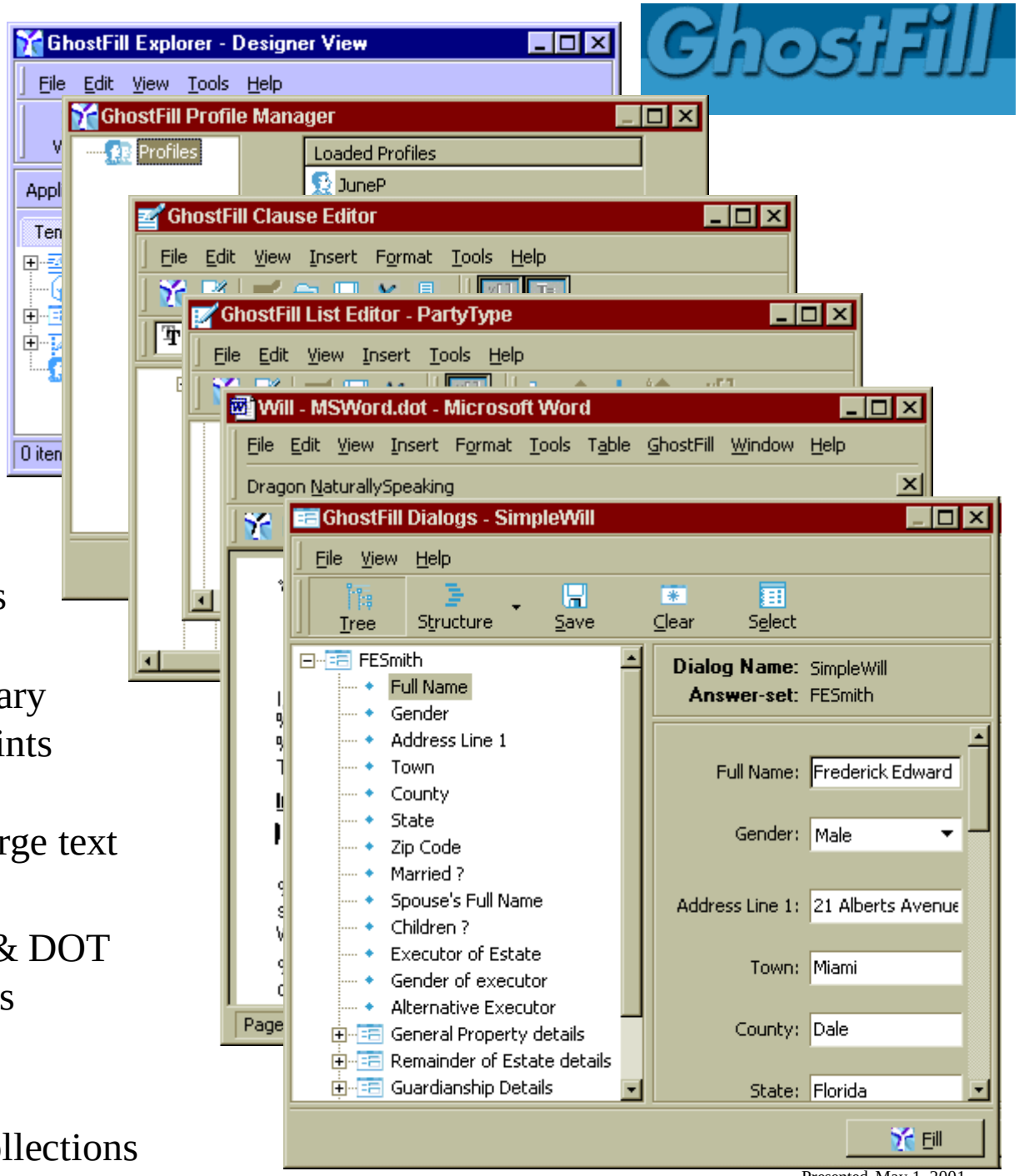
Library vs. Application

HotDocs Pro

- Basic HotDocs Library
  - Individual libraries (local)
  - Network libraries (read only)
  - Developer libraries
- Hybrids and Customization
  - Use of Reference Paths
  - Local library with embedded master library
- Templates
- Component Files
  - Pointing vs. Replication
  - Even with DDS's VCR Utility

Head to Head
Library vs. Application

- GF Explorer
  - User View
  - Designer View
- GF Profile Manager
  - Multiple Profiles
  - Live modifications
- GF Clause Editor
  - Classic clause library
  - Support for Fillpoints
- GF List Editor
  - Programmable merge text
- GF Templates
  - RTF, HTM, TXT & DOT
  - Power of Fillpoints
- GF Dialogs
  - Tree and Details
  - Sub-Dialogs & Collections

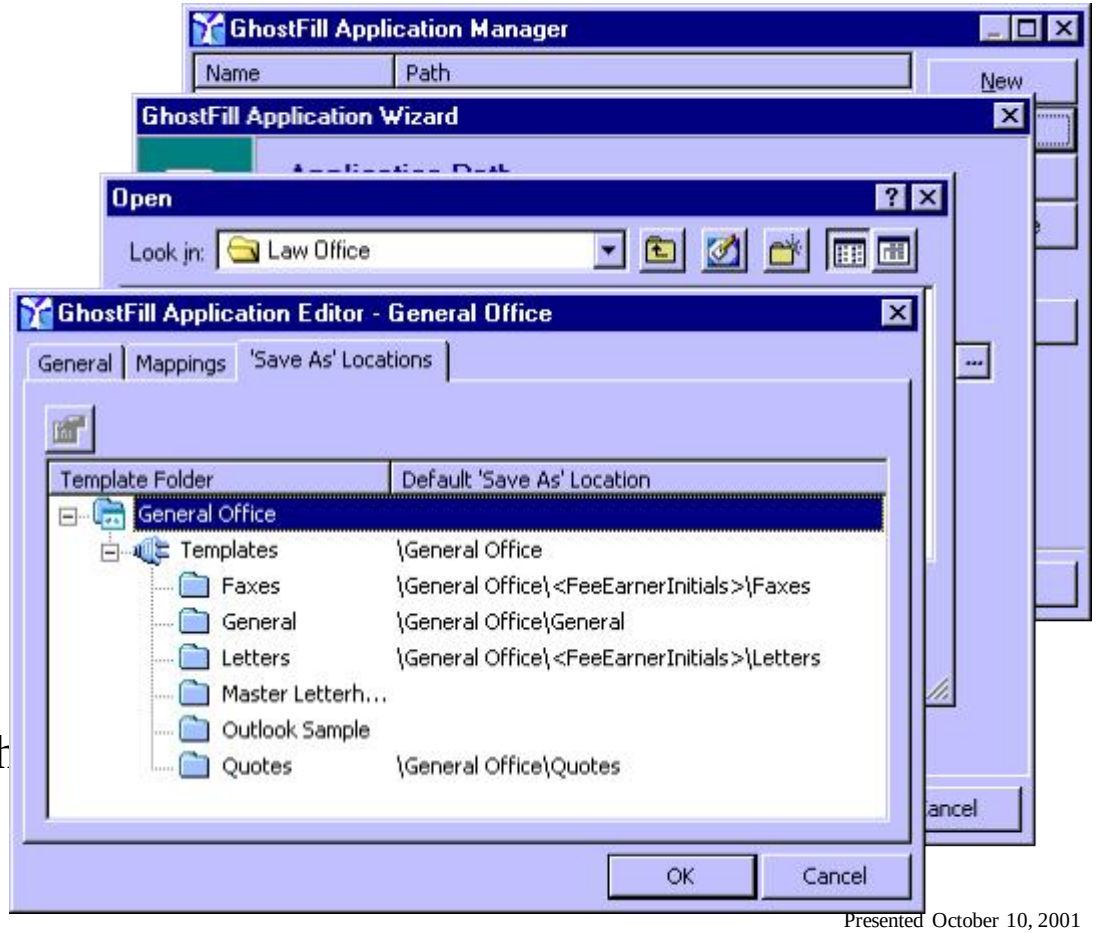


Head to Head

Library vs. Application

GF Application Manager

- GF Application Wizard for new applications
- Just tell GF where to create the application
- To import GF Application, find the XML definition file
- To revise or configure and application – basic info
- Revise file mappings – multiple location support
- Set ‘Save As’ Location with profile variable support

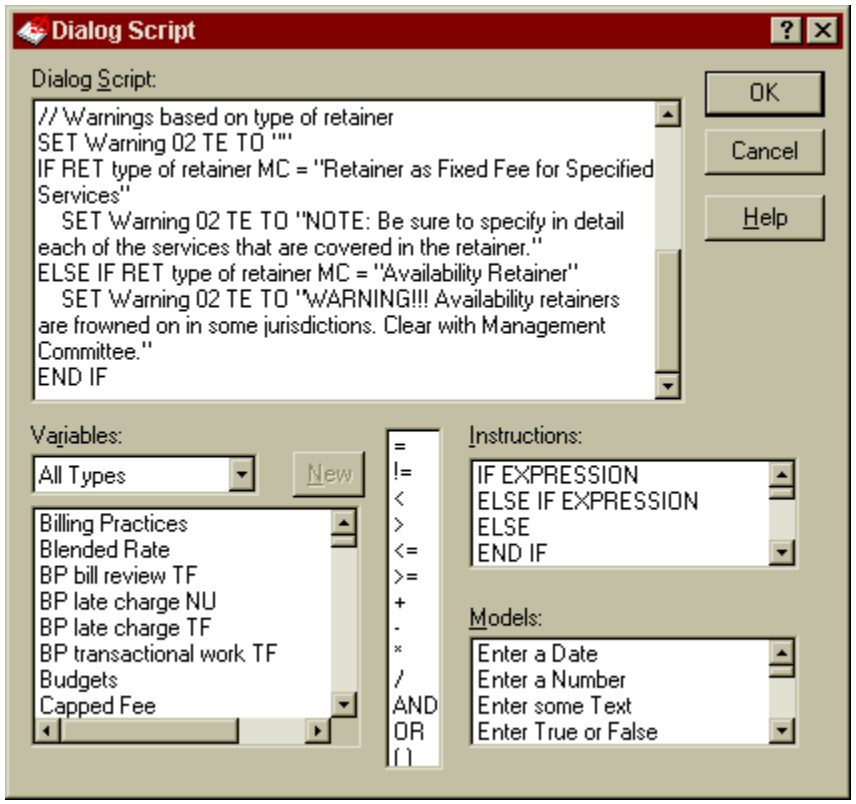


Head to Head

Building Dialogs

HotDocs Pro

- A customized dialog built with HotDocs Pro
- TEST button to view dialog as you build it
- EDIT button and ability to relocate variables
- Variables script – Use of GRAY and UNGRAY
- Warning script – use of the SET TO command

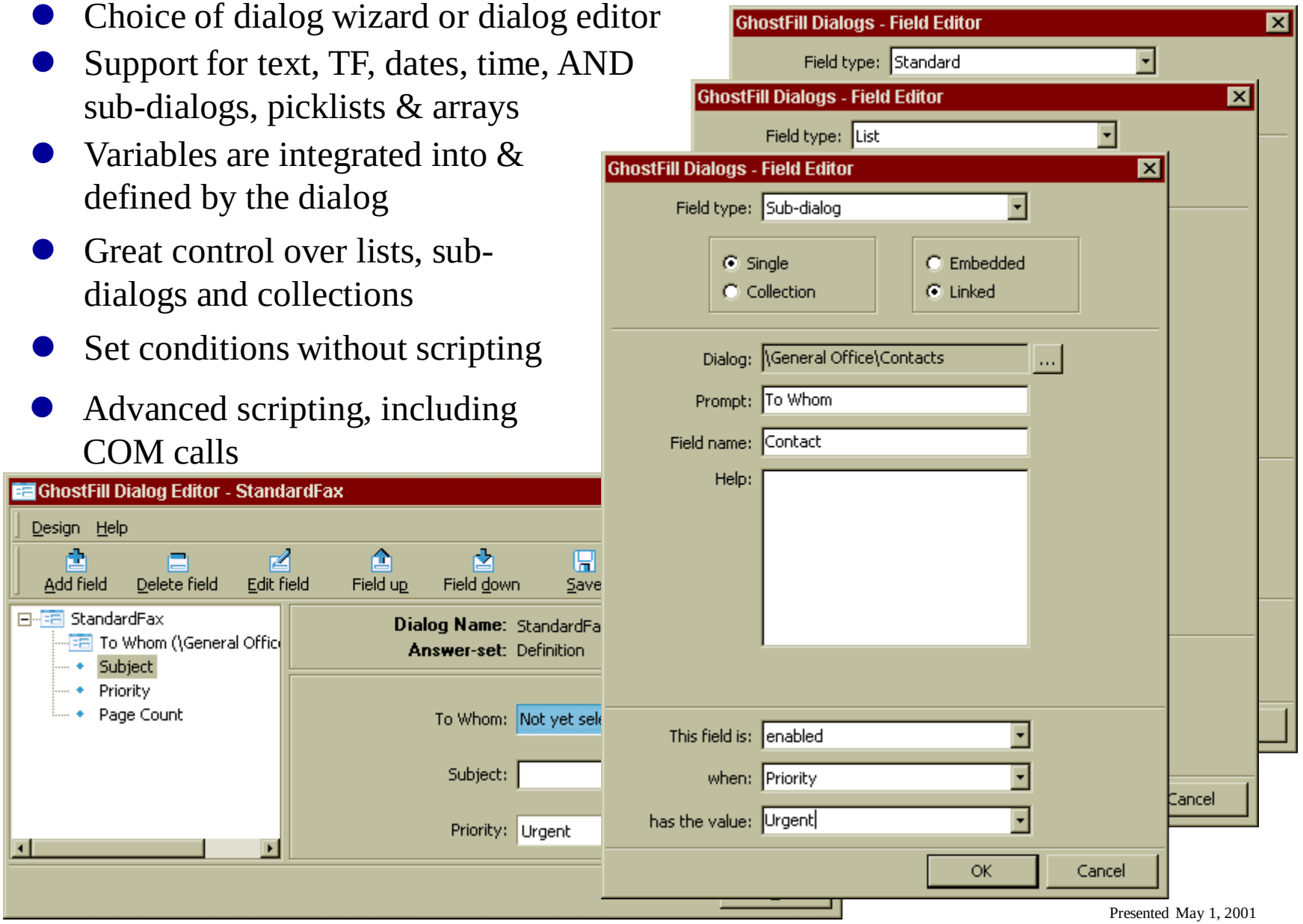


Head to Head

Building Dialogs

GhostFill

- Choice of dialog wizard or dialog editor
- Support for text, TF, dates, time, AND sub-dialogs, picklists & arrays
- Variables are integrated into & defined by the dialog
- Great control over lists, sub-dialogs and collections
- Set conditions without scripting
- Advanced scripting, including COM calls



Head to Head

Fillpoints and Tasks

Types of Fillpoints

Basic variable	«WILL Spouse TE»
Text formatting	«WILL Benefactor TE:LIKE THIS»
Date formatting	«WILL Date of Agreement DA:9 June 1990»
Alternate text	«WILL Benefactor gender TE:he/she»
Basic IF statement	«IF WILL Married TF» …. «END IF»
Delete Block	«IF UNANSWERED(WILL Guardian TE) != FALSE»
Get clause block	«INSERT IF WILL Stepchildren CL»
Dialog calls	«ASK Children DLG»
Repeats	«REPEAT Children DLG»

Head to Head

Fillpoints and Tasks

GhostFill

Types of Fillpoints

- Basic variable — %[Will.Spouse]
- Text formatting — %[UpperCase(Will.Benefactor)]
- Date formatting — %[DateToWords(DateOfAgreement, False)]
- Alternate text — %[Iftrue(Will.gender="Male","his","her")]
- Basic IF statement — %[KeepBlockIf(Will.Married)] …. %[EndBlock()]
- Delete Block — %[DeleteBlockIf(Will.Guardian.Name="")]
- Get clause block — %[Clauses.Select("\nda\", "Parties Description")]
- Dialog calls — %[^Kids = Dialogs.Capture("\Office\", "", False)]
- Repeats — %[RepeatBlockWhile(Index<Kids.Count)]

Head to Head

Fillpoints & Tasks

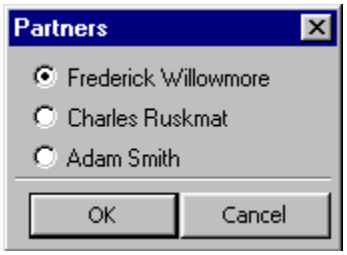
GhostFill

Lists & Profiles

- Define the list
- Call up the list (single select)
- Choose the Partner
- Results defines name, initials and signature
- Select clause uses the result
- Pull in signature
- Define signatory
- Result sets fullname

%[P = Lists.Select("\Office\Firm","Partners")]

%[P.SingleSelectList("Partners", 1)]



%[Fullname="Frederick John Willowmore";
Initials="FJW";
Signature="FJWillowmore"]

%[Clauses.Select("\Office\Sign\",Signature)]

WILLOWMORE RUSKMAT & SMITH

%[FullName] **Frederick John Willowmore**

Head to Head

Fillpoints and Tasks

GhostFill

Working with Objects: Gender

- Define the Object
- Use the object, with proper syntax
- Apply to any variable

%[Gender=CreateObject("Legal.Litigation")]

Apostrophe: **%[**Gender.Parties("Party").sapp**]**

Does/Do: **%[**Gender.Parties("Party").DoesDo**]**

ies/y: **%[**Gender.Parties("Party").IesY**]**

me/us: **%[**Gender.Parties("Party").MeUs**]**

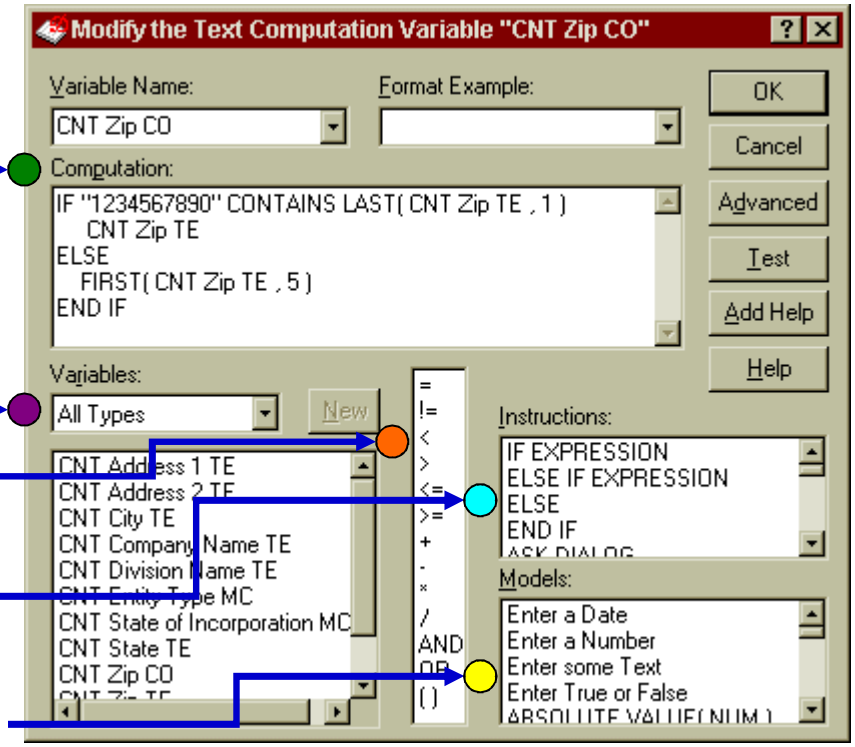
has/have: **%[**Gender.Parties("Party").HasHave**]**

Head to Head

Computation Editor vs. Fillpoint Editor

HotDocs Pro

- Computation Editor and Expression Editor
  - Mini-program with syntax the mirrors programming language
  - Access all variables, dialogs, filters, etc. or create one
  - Operators: =, !=, AND, ()
  - Instructions: IF, ELSE, ASK, REPEAT, FILTER
  - Models: COUNT, ANSWERED, INTEGER

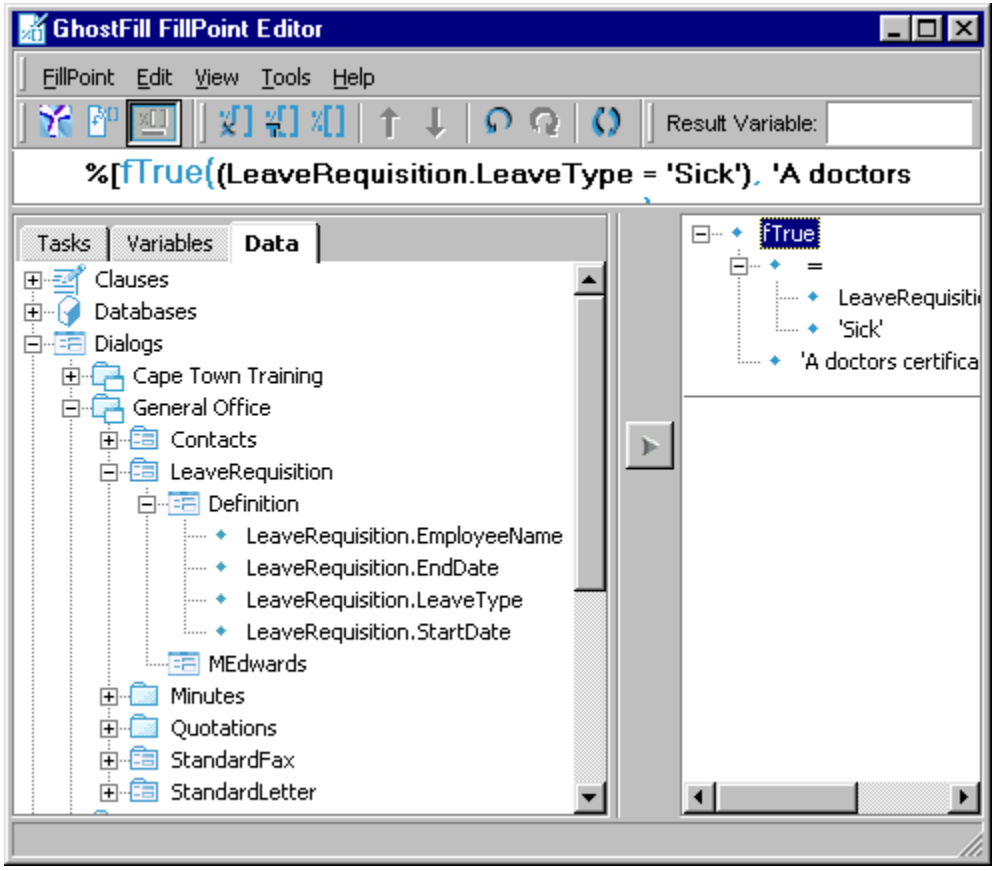


Head to Head

Computation Editor vs. Fillpoint Editor

- Basic Fillpoint
  - Simple to Complex
  - Built with Fillpoint Editor
- Tree Logic
  - Break into tasks and objects
  - Just click to expand
- Task List
  - Complete set of functions
  - Syntax builder and help
- Variables List
  - All open templates
- Data List
  - Clauses and Databases
  - Templates and Documents
  - Lists and Profiles

[IfTrue((LeaveRequisition.LeaveType = "Sick"), "A doctors certificate is attached.")]



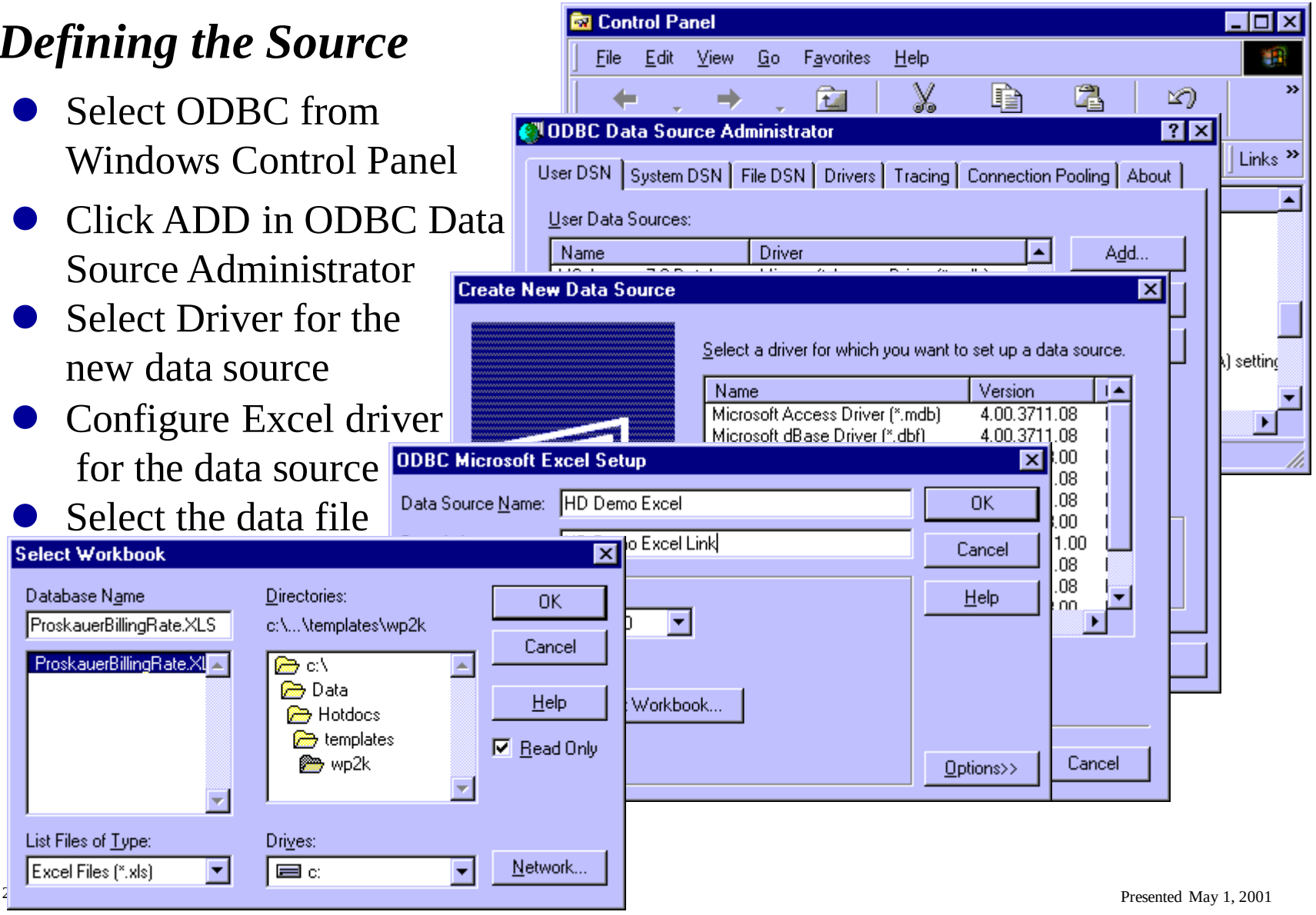
Head to Head

External Data Sources

Database Connection

Defining the Source

- Select ODBC from Windows Control Panel
- Click ADD in ODBC Data Source Administrator
- Select Driver for the new data source
- Configure Excel driver for the data source
- Select the data file



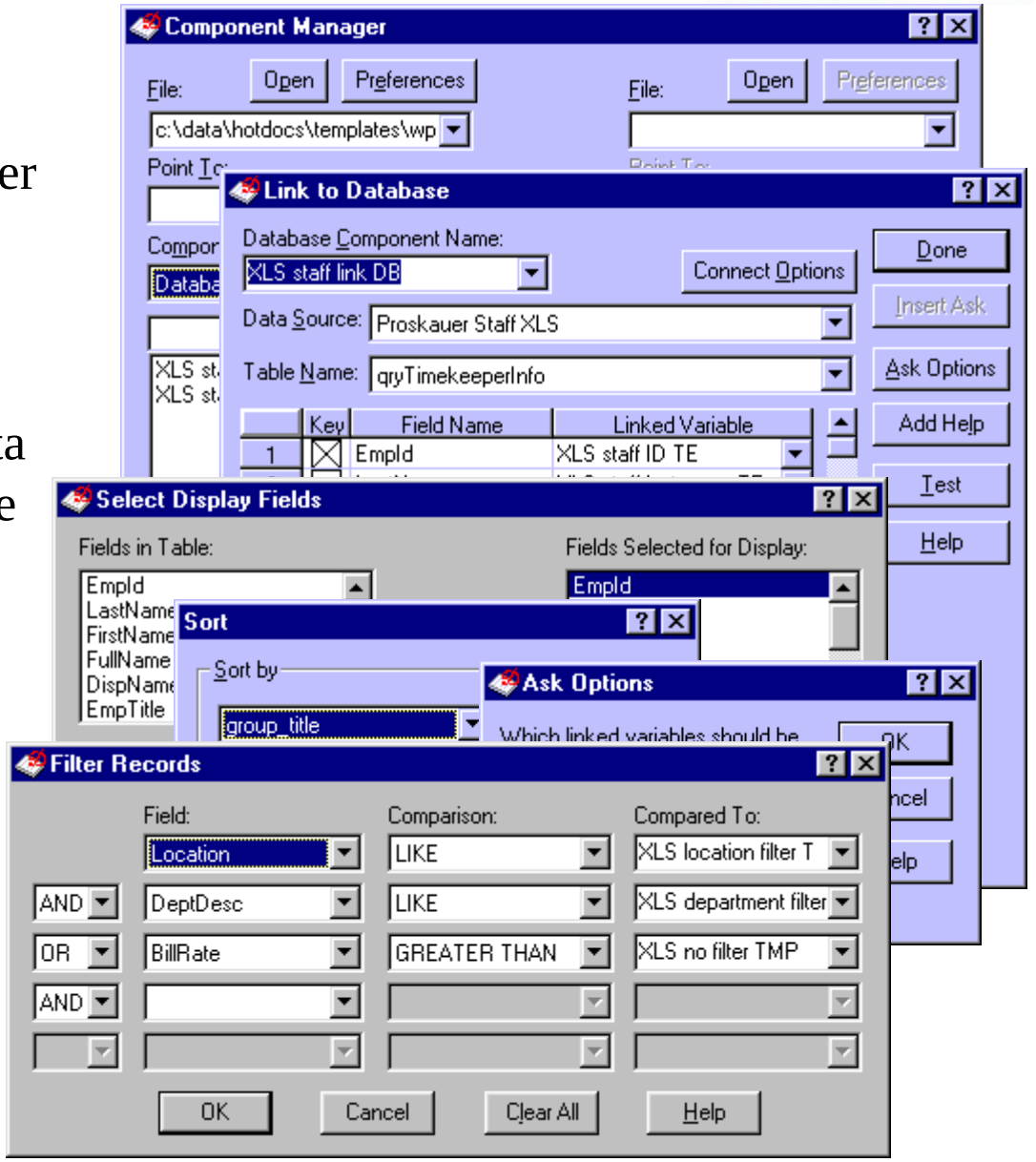
Head to Head

External Data Sources

Database Connection

Create & Configure

- Open Component Manager and create New database component
- Name the component
- Select the pre-defined data source and select the table
- Map the fields in the data source to predefined variables
- Select display fields
- Define the sort order
- Configure Ask Options
- Apply pre-defined filter



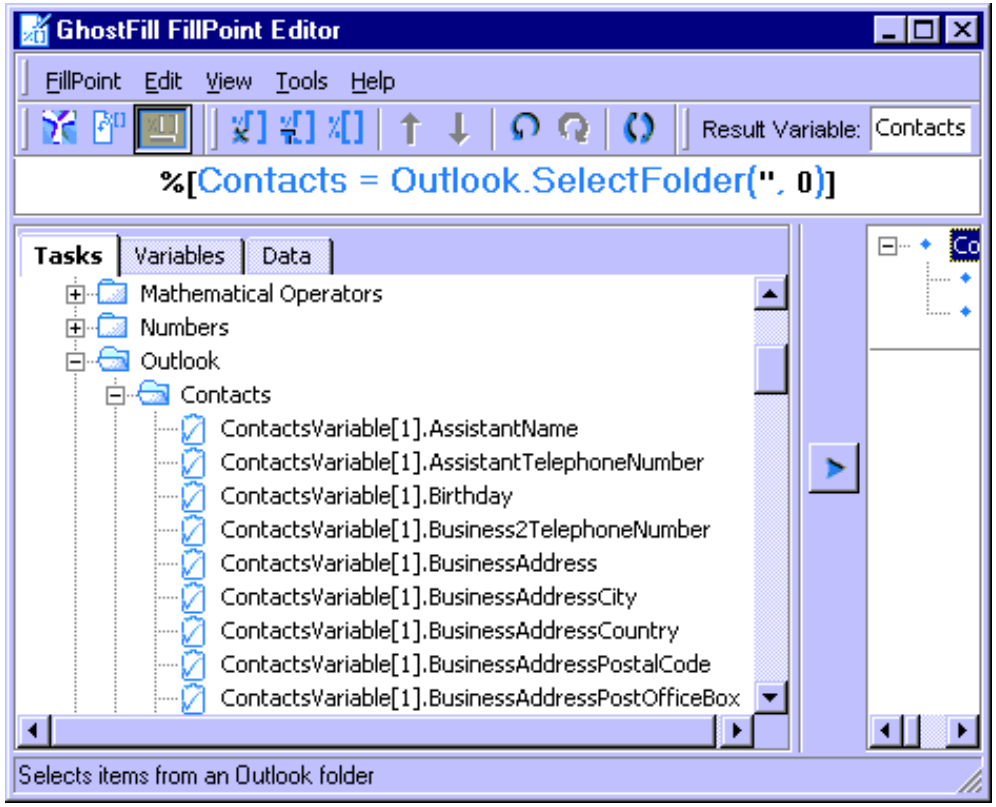
Head to Head

External Data Sources

GhostFill

MS Outlook (COM)

- Define Outlook link
- Get contact name
- For multiple contacts, first set index to 1
- Repeat block with conditions, indexed variables and counter
- Conditions on salutation to use first name or “Sir”



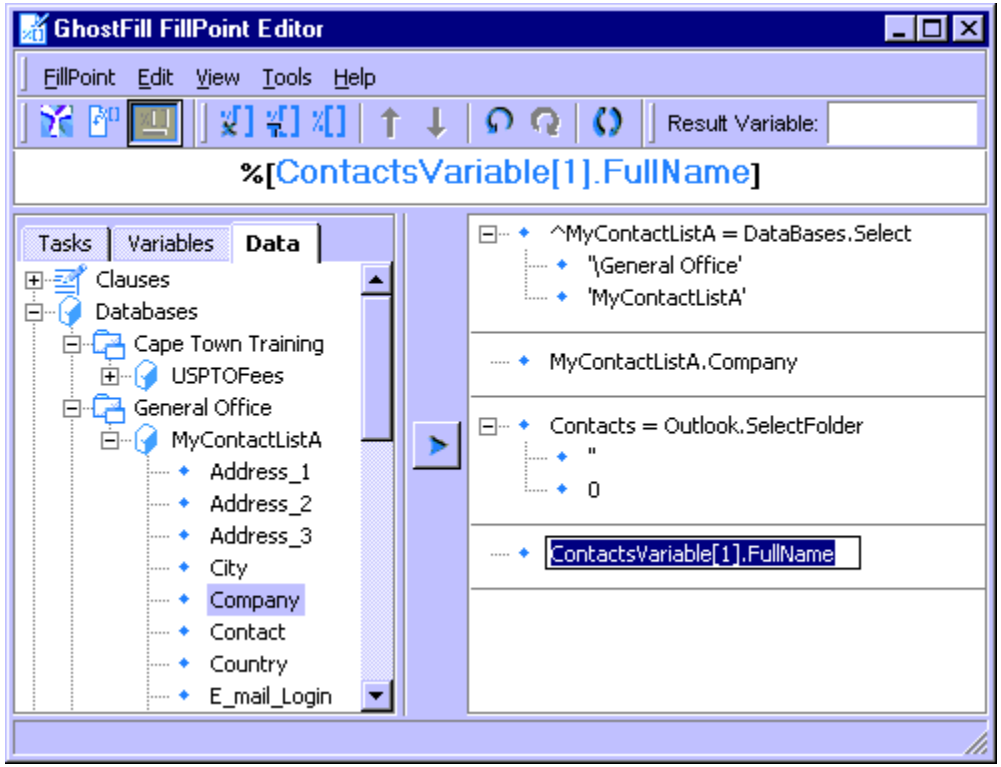
Head to Head

External Data Sources

GhostFill

DataLink Wizard (ODBC)

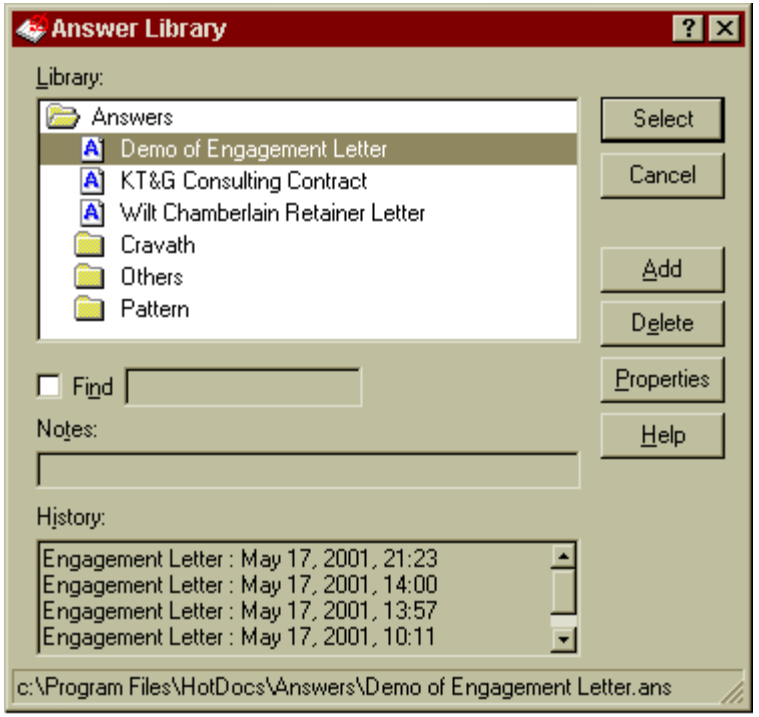
- Name the DataLink
- Select/create data source
- Name the data source
- Select the data type
- Find the data
- Select the table or sheet
- Choose display columns
- Set access options
- DataLink Summary
- Ready to Use



Head to Head

Answer Files & XML

- Answer File Options
  - Individual answer library
    - Stored on local drive
    - Cannot be effectively shared over a network
  - Answer file management off, with shared network directory
  - Answer file profiled and stored in iManage or DocsOpen



Head to Head

Answer Files & XML

HotDocs Pro

- What is XML?
  - XML = Extensible Markup Language
- Why use XML?
  - Standard format to transfer data
  - HotDocs 5.3 & Online
- XML Definitions
  - Answers
  - Repeats
  - Variable types
  - Answer set title

Document Type Definitions

```
<!ELEMENT AnswerSet (Answer*)>
<!ELEMENT Answer (TextValue | NumValue | DateValue | TFValue | MCValue |
      ClauseLibValue | DBValue | RptValue)>
<!ELEMENT RptValue (TextValue* | NumValue* | DateValue* | TFValue |
      MCValue* | ClauseLibValue* | DBValue* | RptValue*)>

<!ELEMENT TextValue      (#PCDATA)         >
<!ELEMENT NumValue       (#PCDATA)         >
<!ELEMENT DateValue      (#PCDATA)         >
<!ELEMENT TFValue        (#PCDATA)         >
<!ELEMENT MCValue        (SelValue*)       >
<!ELEMENT ClauseLibValue (ClauseSelValue*) >
<!ELEMENT DBValue        (DBColumn*)       >

<!ELEMENT DBColumn (TextValue | NumValue | DateValue | TFValue | MCValue)>
<!ELEMENT SelValue       (#PCDATA)         >
<!ELEMENT ClauseSelValue  EMPTY            >

<!ATTLIST AnswerSet title CDATA #IMPLIED save (true | false | nochange)
      #IMPLIED useMangledNames (true | false) #IMPLIED>

<!ATTLIST Answer name CDATA #REQUIRED save (true|false|nochange)#IMPLIED>

<!ATTLIST TextValue      unans (true | false) #IMPLIED>
<!ATTLIST NumValue       unans (true | false) #IMPLIED>
<!ATTLIST DateValue      unans (true | false) #IMPLIED>
<!ATTLIST TFValue        unans (true | false) #IMPLIED>
<!ATTLIST MCValue        unans (true | false) #IMPLIED>
<!ATTLIST ClauseLibValue unans (true | false) #IMPLIED>
<!ATTLIST ClauseSelValue title CDATA #REQUIRED fileName CDATA   #REQUIRED
      description CDATA   #IMPLIED>
<!ATTLIST DBColumn name CDATA #REQUIRED>
```

Head to Head

Answer Files & XML

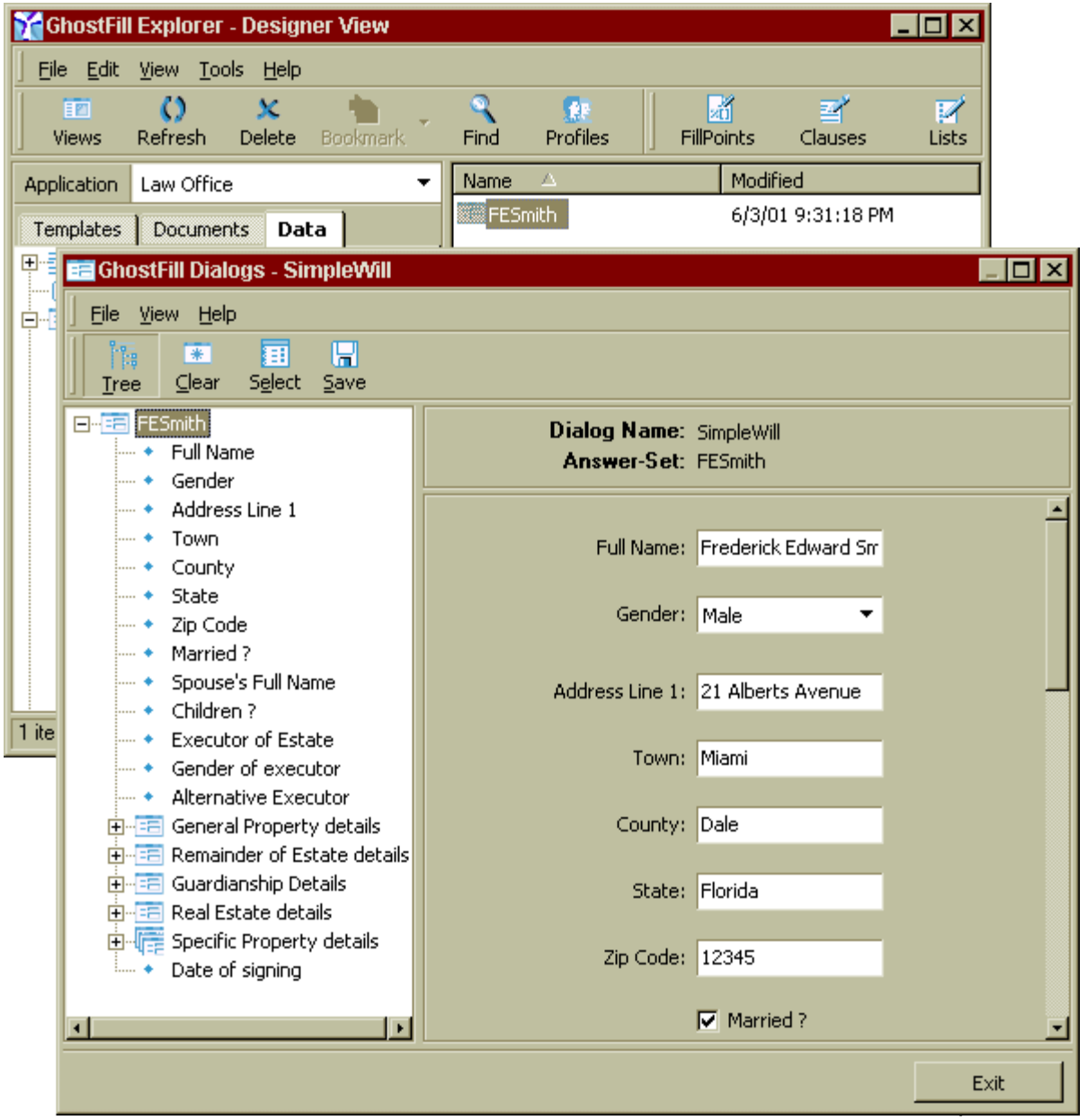
- XML answers
  - AnswerSet title
  - Answer name
  - TFValue
  - DateValue
  - NumValue
  - TextValue
  - RPTValue
  - MCValue

```
        <Answer name = "Simple project hourly rate NU">
                <NumValue>150</NumValue>
        </Answer>
        <Answer name = "(ANSWER FILE DESCRIPTION)">
                <TextValue></TextValue>
        </Answer>
        <Answer name = "Contractor TE">
                <TextValue>Weil</TextValue>
        </Answer>
        <Answer name = "Contractor city TE">
                <TextValue>New York</TextValue>
        </Answer>
                <Answer name = "Contractor name TE">
                <TextValue>Weil, Gotshal &amp;amp; Manges, LLP</TextValue>
        </Answer>
        <Answer name = "Contractor state TE">
                <TextValue>NY</TextValue>
        </Answer>
        <Answer name = "Contractor street1 TE">
                <TextValue>767 Fifth Avenue</TextValue>
        </Answer>
        <Answer name = "Contractor zip TE">
                <TextValue>10153</TextValue>
        </Answer>
        <Answer name = "Simple Project description TE">
                <TextValue>Automation of Generic Opinion Letter</TextValue>
        </Answer>
        <Answer name = "Simple project document TE">
                <RptValue>
                                <TextValue>Opinion Letter</TextValue>
                                <TextValue>Backup Memo</TextValue>
                </RptValue>
        </Answer>
</AnswerSet>
```

Head to Head
Answer Files & XML

GhostFill

- Dialog answers stored in XML answer-sets
- Answer sets are editable independent of any document or template with a single click
- Persistent storage of *all* application data objects in XML:
  - Dialogs
  - Answer-sets
  - Datalinks
  - Clauses
  - Application mapping



Head to Head

Use of XML

GhostFill

XML Data lends itself to multiple views

Dialog Summary

Report View

Basic View

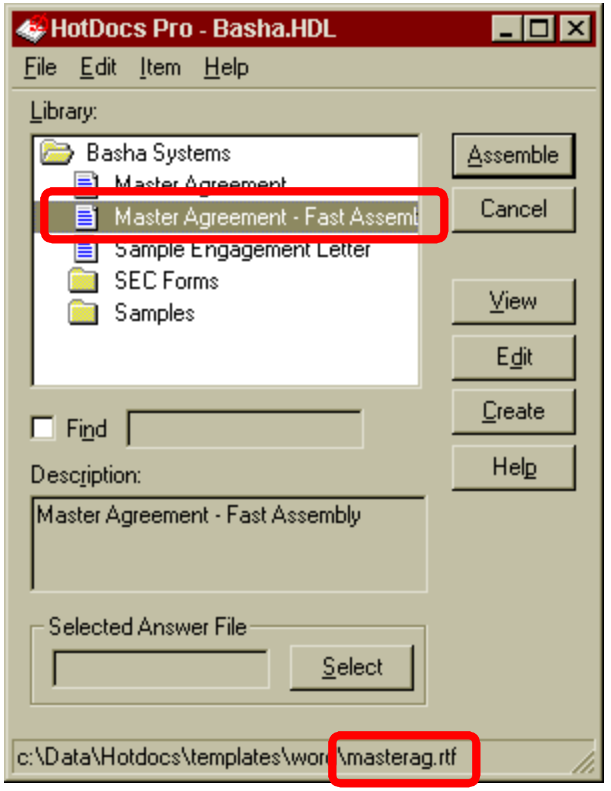
Raw XML

Head to Head

Fast Assembly

HotDocs Pro

- Why Fast Assemble?
  - Long document assembled in seconds vs. minutes
  - DOT templates rely on slow Word macros for assembly
  - RTF templates don't
- Converting DOT to RTF
  - Select the template
  - Click CREATE
  - Change file extension & title
  - Click OK

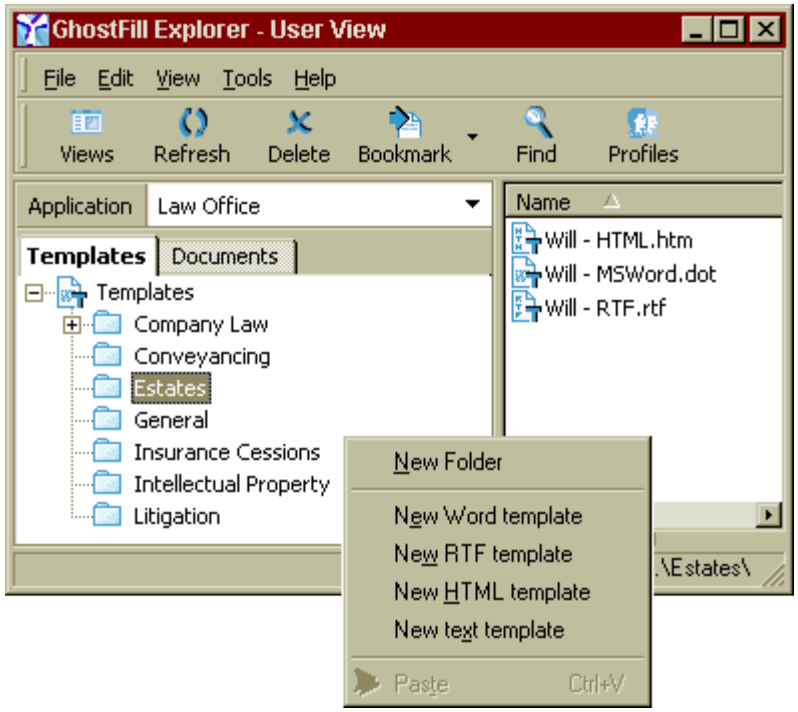


Head to Head

Fast Assembly

GhostFill

- Fill to Word uses Word to perform assembly
- Fill to RTF, HTML and plain text occurs outside word processor
- Can fill from GhostFill Explorer or via ActiveX control from another application
- Conversion … just change the file format

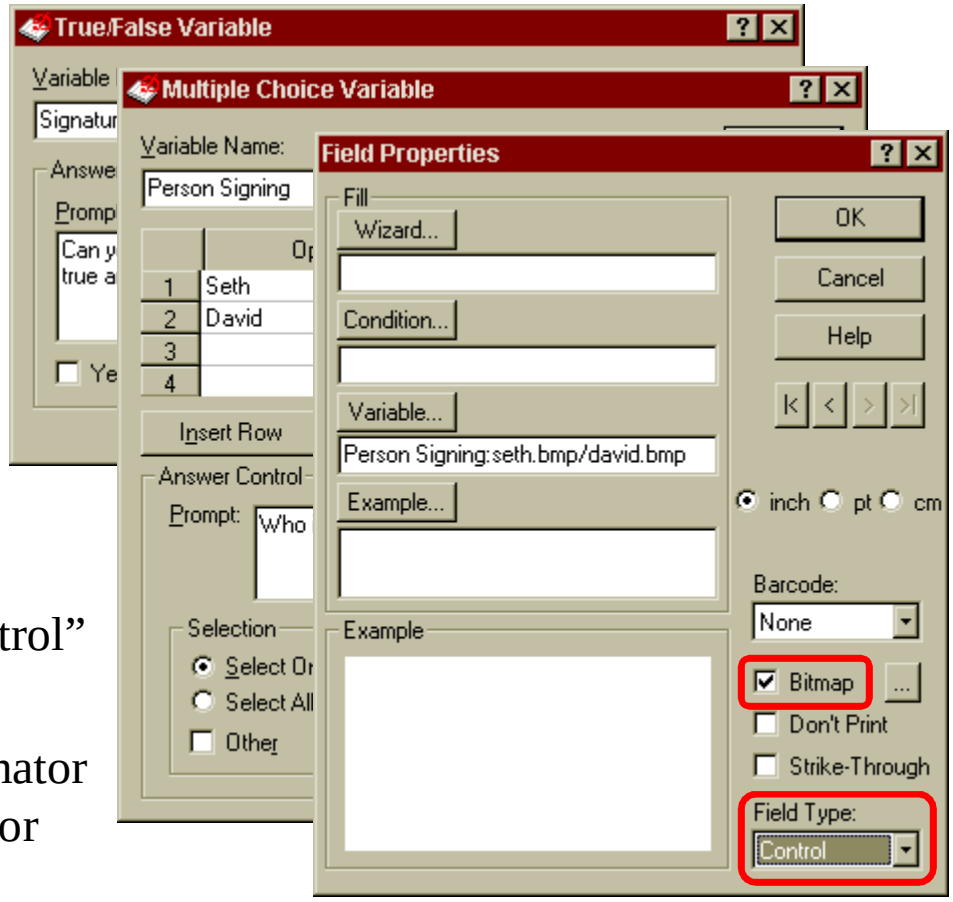


Head to Head

Rule-based Graphics

HotDocs Pro

- Signatures
  - For True/False variables, use a graphic file as your "Format Example"
  - For multiple choice variables, use a graphic file as your "Merge Text"
  - Define your Field Properties to allow bitmap files
  - Set your "Field Type" to "Control" to make bitmap non-editable
  - Caution: Limited to HD Automator … else use INSERT Template or insert clause



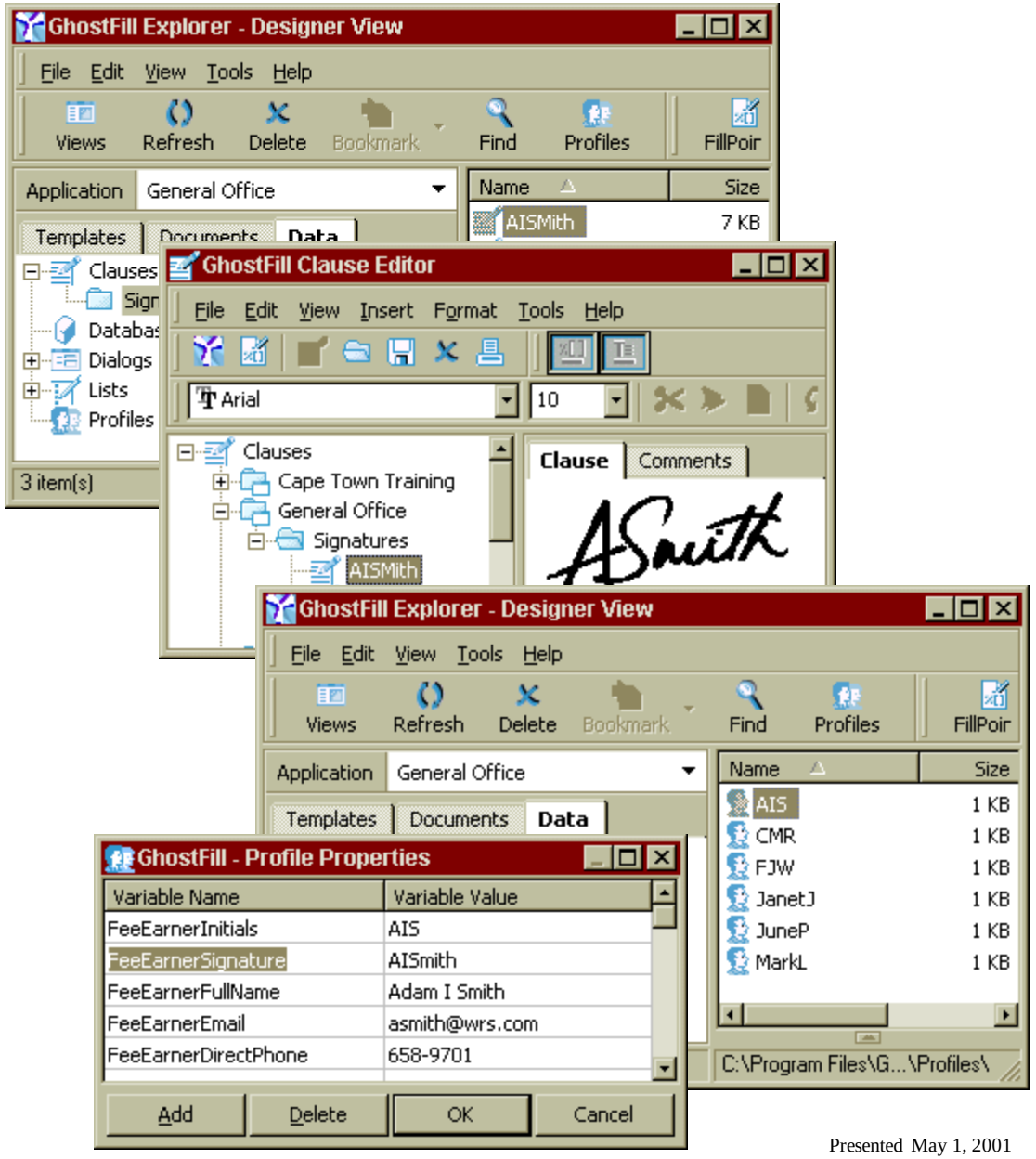
Head to Head

Rule-based Graphics

GhostFill

Signatures

- Define a new signature clause in GhostFill Explorer
- Drop your signature graphic into the clause
- Pull up a list of user profiles
- Reference the signature clause in the profile
- Place the variable anywhere in the document
- File Formats:
  - Bitmaps (bmp)
  - Metafiles (wmf)



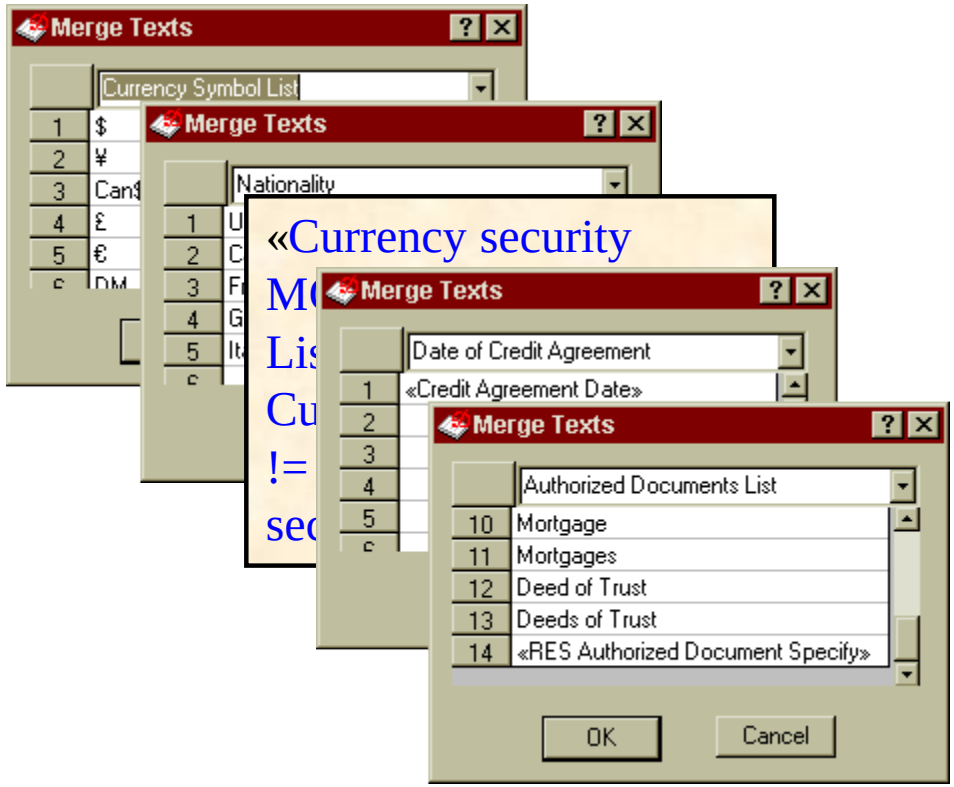
Head to Head

Dynamic Merge Lists

HotDocs Pro

- Merge Text components
  - Standard – Defined in Template Variable
  - Merge list as a component that can be used for multiple variables
  - Dealing with NEW items
    - In the Template
    - In the Merge Text
  - Ability to add variables to text of merge list

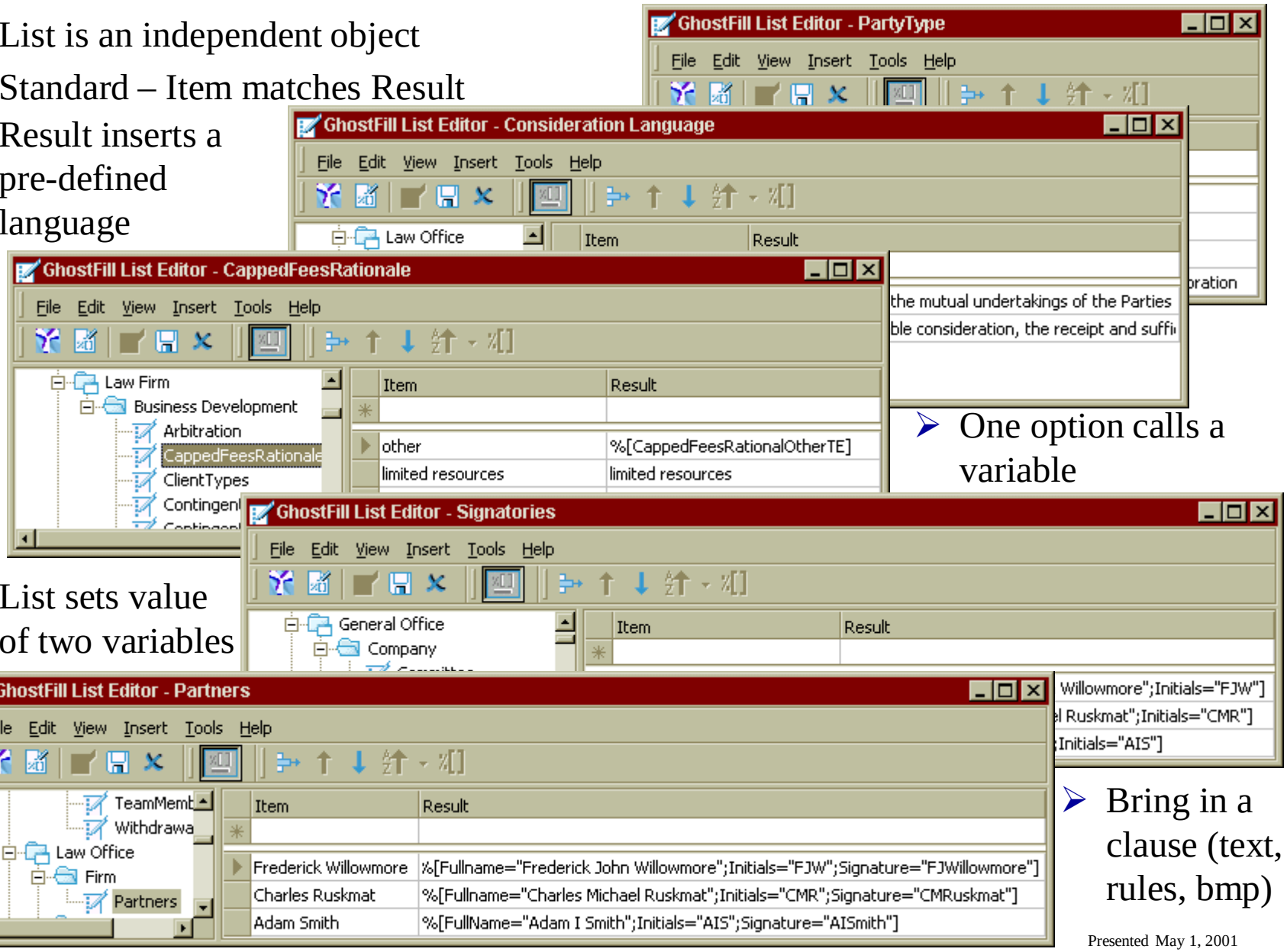
«Gender of Employee:he/she»



Head to Head
Dynamic Merge Lists

GhostFill

- List is an independent object
- Standard – Item matches Result
- Result inserts a pre-defined language
- List sets value of two variables
- One option calls a variable
- Bring in a clause (text, rules, bmp)



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Open Forum for Questions

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GhostFill Training

- Introduction to GhostFill 2001
- Fillpoints and Functions
  - Types of Fillpoints
  - Working with Objects
- External Data Sources
  - Outlook
  - Excel/Access/SQL
- Dialog Design
- Lists and Profiles
- GhostFill Back Office